

Social Enterprising Europe (SEE)

SEE LEARNING PROGRAMME

LEARNER'S HANDBOOK

WP4: Training Materials

Deliverable 4.1: Learner's Handbook

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Note to designer: The original formatting has been taken out. Please format in a user friendly way. Also D3.1 suggested use of graphics. Please refer to that in the overall design.

INTRODUCTION

IS THIS LEARNING PROGRAMME FOR YOU?

Yes, if you want to start or improve a social enterprise!

This learning programme is suitable for people who already have basic understanding of social entrepreneurship as well as for new students. Even if you do not have a basic understanding of social enterprise, we offer in this learning programme the basic concepts you need and references to expand your knowledge.

This programme does not address all the possible aspects of running an enterprise. Instead it focusses on the particular aspects of **social** enterprise.

This Social Enterprising Europe (SEE) Learning Programme has been designed to complement ~~to~~ basic entrepreneurship know-how. It will help to 'translate' your social entrepreneurial competences to match with ethical and social concerns.

Be aware that many concepts change when applied to a social enterprise, so it is important to assert the vision of social enterprise but at the same time you have to be able to adapt your social enterprise with what you learn from a variety of sources.

You do not need to learn everything in this programme. Learning to be a "social entrepreneur" is a process that never ends.

Therefore, we recommend you complement the contents of this programme with other information, other training you may have been involved in, and other reading.

The learning programme consists of eight modules which are integrated but also can 'stand-alone'. They are:

- MODULE 0. PREPARING to change the world
- MODULE 1. BUILDING a better world
- MODULE 2. CREATING social change
- MODULE 3. CONNECTING with stakeholders
- MODULE 4. ACCOUNTING for quality and impact
- MODULE 5. INVOLVING people and leading
- MODULE 6. ACHIEVING financial sustainability
- MODULE 7. PLANNING social enterprise

Differences between this series of modules and a 'traditional enterprise' learning programme

Traditional enterprise or business programmes often use the same terminology but intrinsically mean something different. We do not want to repeat what one may learn in a traditional learning programme - but add to it. The SEE Learning Programme places emphasis on social issues. The following table illustrates the difference in some important enterprise aspects.

Enterprise aspects	Traditional enterprise programme	SEE Learning Programme
Mission of the enterprise	Business purpose – maximise profit	Social purpose – maximise social and community benefit
Staff, governance, management	Money decisions: hierarchies; chain of command	Social motivation; participatory leadership; democracy; working with volunteers; inclusive employment
Products and services	Any type	Positive contribution to society; ethical reflection about sustainability and 'good' work
Market studies	Demand of customers	Social needs; aware of the customers sensitivities and needs
Marketing	Advertising budget and competition	Social communication; benefits for the society; transparency; fair prices and collaboration
Finance	Loans and investment	Crowd funding; 'sweat' equity; social investors
Legal structures	Companies, partnerships	Co-operatives; companies, associations; foundations; not for profit enterprises
Impact	Profit and loss; balance sheet	Social impact as well as financial sustainability

It is important that people managing the social enterprises understand that the enterprise exists to create social and/or community benefits. Social enterprise straddles the worlds of business and social/community benefit where economic activity is undertaken for the benefit of people, the planet and society and not for the benefit of individuals at the expense of others (or indeed at the expense of the planet!).

WHY SHOULD YOU PARTICIPATE IN THIS LEARNING PROGRAMME?

The methodology used in this learning programme is firmly based on the **practical** application of concepts and what it means to a social entrepreneur. The activities suggested, encourage interaction with other learners (peer learning).

The encouragement of active participation during the learning programme will help to create communities of social entrepreneurs. The resultant networks will help you to form alliances with other similar people and this will ultimately strengthen your social entrepreneurship learning and assist social your enterprises more widely to achieve their social purposes.

Get creative! You are a social entrepreneur! This is not a traditional learning programme where you sit and listen to the teacher in a passive way.

HOW TO USE AND NAVIGATE AROUND THE LEARNING PROGRAMME AND THE MODULES

The SEE Programme proposes that you as a learner may want to participate in some modules in a specific order. However, it is flexible enough to participate in it as you see necessary depending on your background and your needs.

The learning programme can be used even if you do not want to start a social enterprise immediately. In that case, we recommend that you still work through the modules to understand the stages involved in social enterprise development as an **idea** - applying that idea to the different activities in each of the modules.

In this Learner's Handbook you can see the overall methodology. We have taken a progressive approach, from a personal reflection on the environment, through to reinforcement of skills and knowledge and up to the development of a social enterprise plan. The following diagram illustrates this with two preparatory modules (0 and 1); and modules 3, 4, 5 and 6 standing alone but still contributing to the social enterprise plan (7).



Structure of each module

In essence, each module is structured in the following way:

1 Presentation of the module

Module subject/title	The essence of the module
Modular outlines	Introduction to the subject with an overall aim.
Learning outcomes	This is the expected changes in the learning after tackling the module

2 Activities

Step 1: Personal knowledge and previous experiences

This part relates to the experience and knowledge of the participants.

Step 2: Learn from other's experiences and generate a new experience

This part relates to the experience and knowledge of **others**, mainly cases studies. It will include activities to generate a new experience with the participants.

Step 3: Development and learning of theories and applicable tools

This part introduces theories and tools about the issue and invites the group to generate new ones.

Step 4: Putting it into practice

This part is the end of the module where you should be able to apply your own ideas to your own social enterprise. If you do not have an enterprise yet you will be expected to choose another real situation.

3 Cross-cutting issues

Throughout each module there will be 'cross cutting issues' which we have termed 'ethical considerations'. These may include issues around gender, environment, race and other societal considerations.

The learning programme brings, as much as is possible, a central ethical dimension to business activity which focuses on social justice, fairness and an obligation to the most disadvantaged in society.

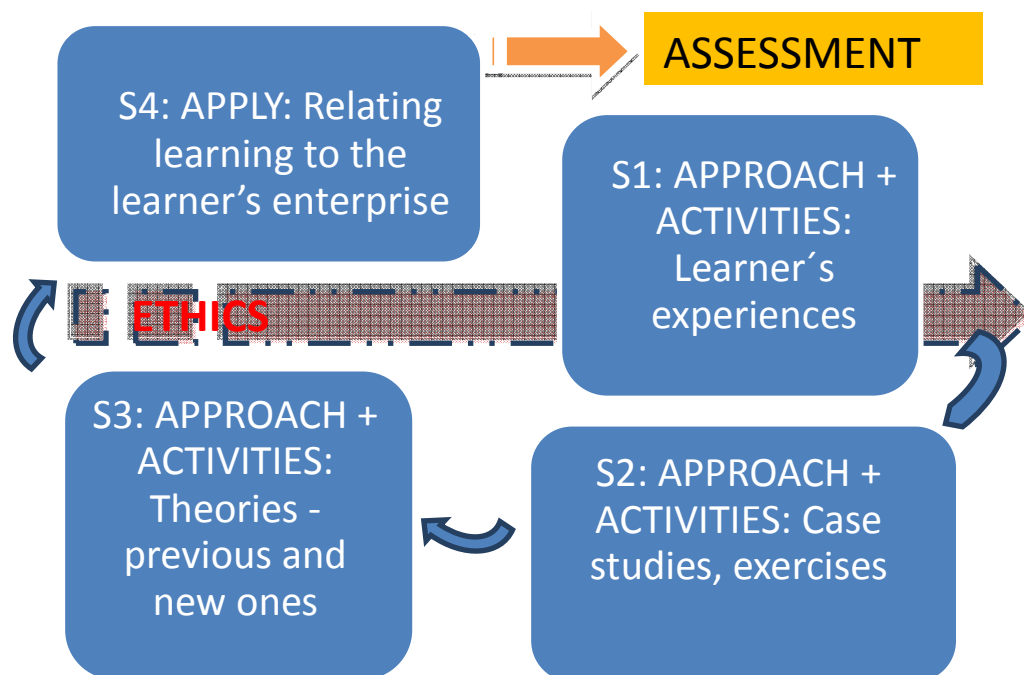
The ethic dimension is a 'must' for a social enterprise and should run through each of the modules. The enterprise survival and the profit is not a priority for a social enterprise **if** the ethic is lost and the activity does not reflect the mission. Sometimes it will be difficult to resist the pressure of the market and social entrepreneurs should be made aware of this. Having said this, the facilitator does not have to judge the learners' motivations, only to facilitate their periods of reflection.

In each module, the SEE Learning Programme proposes some key points to promote debate in the group and personal reflection. It is not a separate part, but you along with the facilitator should be able to work the ethics in throughout the course.

You can make proposals to be debated!

4 Assessment and reflections

At the end of each module there should be a time for you to assess the learning you have achieved and to reflect on that learning.



Different ways to participate in the course

Although the SEE Learning Programme proposes an order, content and specific activities - it can however be used as thought necessary, based on your prior knowledge and your professional needs. It is a flexible learning programme.

The learning programme consists of independent modules so that you can participate in the parts you want to.

The method offers tools and concepts and you can use them to improve your own enterprise, build a social enterprise plan or just to reflect about social enterprise in general. The following diagram illustrates this and compares it to building different structures using the same 'bag' of differing bricks.



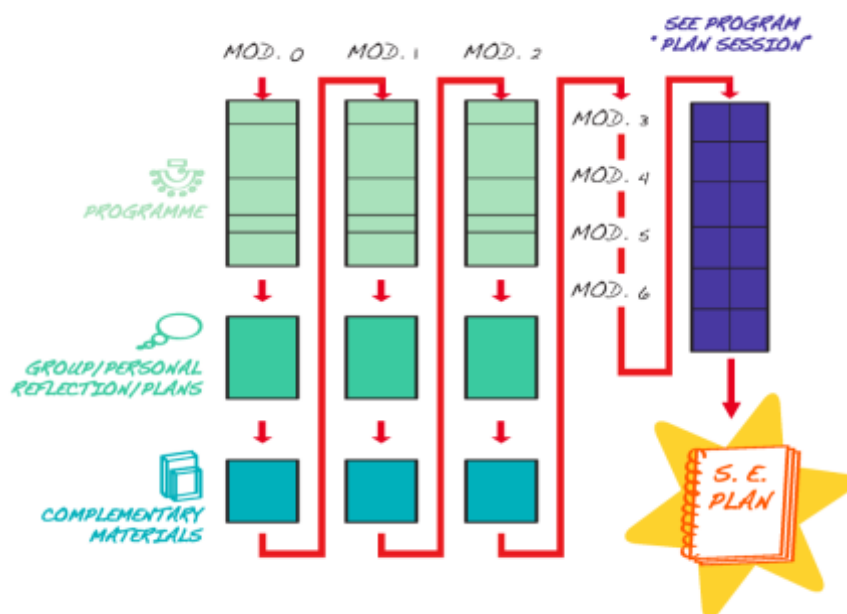
Each Module has different parts:

- **Programme:** main contents of the module: concepts, attitudes to promote, activities and tools
- **Reflection and plans:** activities to reflect, assess and apply to each participant's situation; and
- **Complementary materials:** suggestions for more in-depth learning such as books, links, visits, etc.

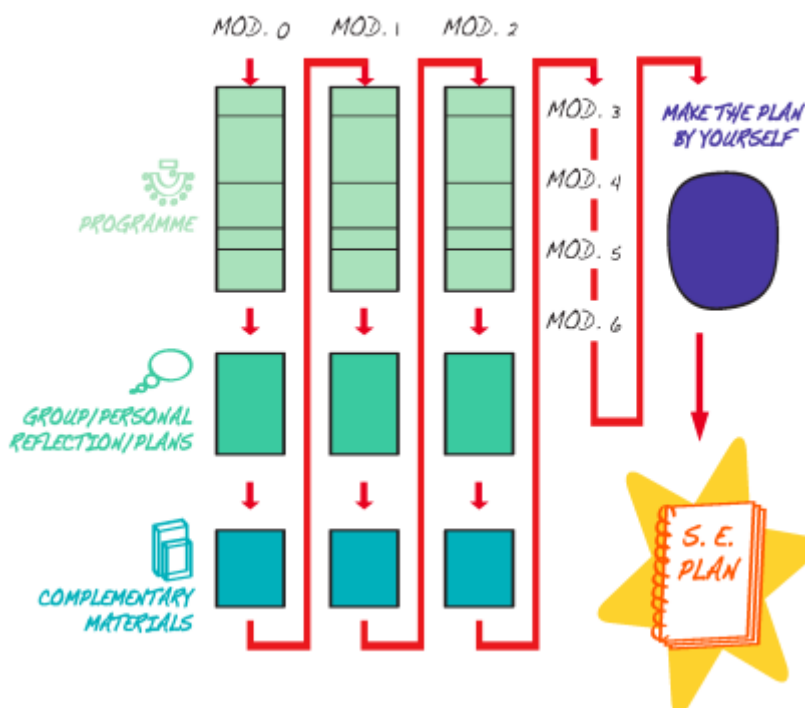
In addition, the learning programme allows for you to follow the learning programme in a flexible way. The participating options are to follow the classic 'tour'; 'tour' without following the module that addresses the social enterprise plan; go straight to the social enterprise plan; or go for a 'free tour'...

The options to participate are:

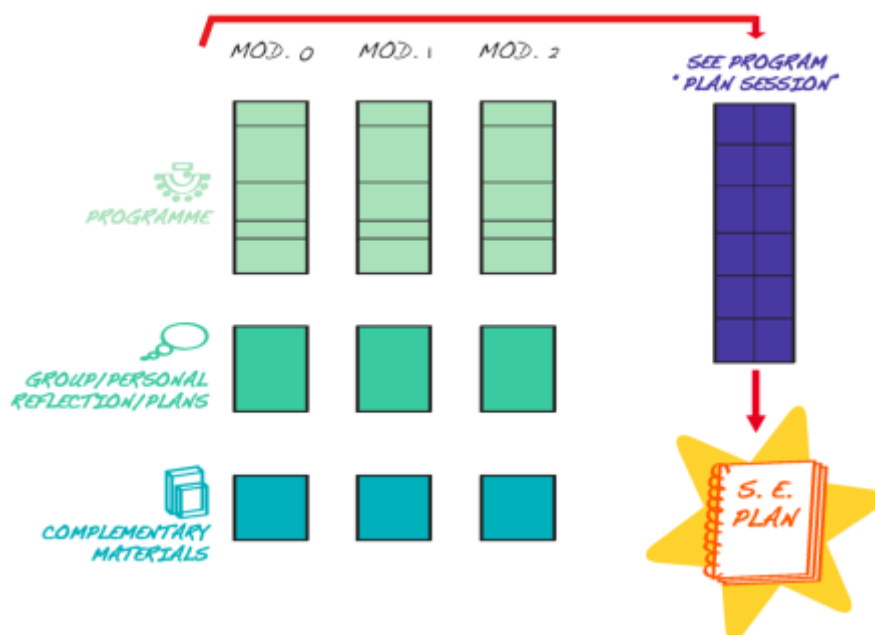
- 1 "Classic Tour" - complete all modules and the social enterprise or business plan:



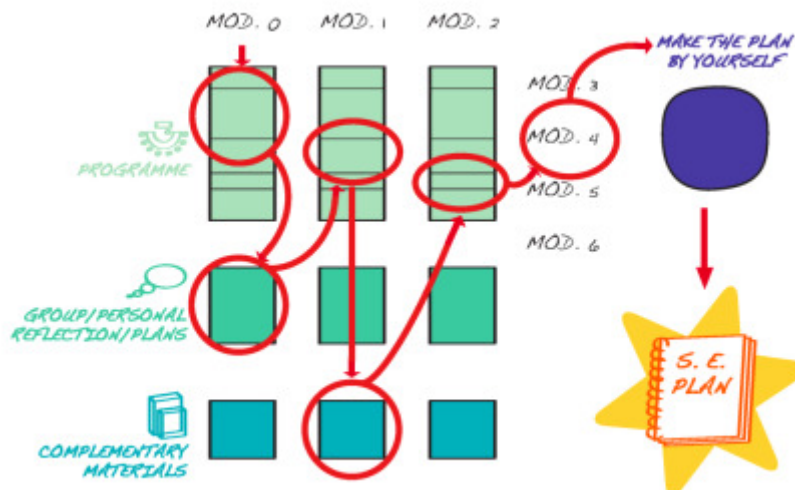
- 2 **Tour without social enterprise planning** - complete workshops (all or part) and make the plan on your own.



3 No tour – going straight to the social enterprise planning module



4 'Free Tour' - you choose which parts of the modules to participate in. The plan follows your own design and addresses your own needs.



HOW TO APPLY THE VALUES AND APPROACH OF THE PROGRAMME

Underpinning the programme are clear principles (borrowed in part from the Social Enterprise Academy but shared by all partners in the SEE project). These principles are summarised as follows:

- **The learning builds on the experience and knowledge of the learners:** Everyone has useful knowledge and experience to share and each module should be designed to

enrich the learner's own practice by learning as much as possible from what others are doing.

- **The learning will thrive on exchange between people:** We shall use as much as possible peer learning with facilitators who are not experts but peers. However, the facilitators understand social enterprise and will create opportunities for learners to share ideas, experiences and learning. This will open up dialogue amongst learners.
- **The learning will focus on critical questions:** Questions open up spaces for new thinking; they stimulate the brain and creativity. The facilitators will use questions to support and challenge the learners to come up with their own solutions.
- **The learning will stimulate change, development and growth:** The focus will be on the personal learning process. The learning programme will enable learners to be self-aware, building on their own strengths, having the courage to try out new ways of doing things, and learning from their experience.
- **The learning will encourage entrepreneurship and blue sky thinking:** The programme will create a climate which is conducive to blue sky thinking: lots of contributions, ideas, brainstorming, mind-mapping, using pictures and images and creating metaphors.
- **The learning will help learners to take the initiative and act:** Learners will be helped to come up with new insights, new ways of working and of putting the learning to use. It should celebrate a learning journey which has brought about change and development through action.
- **The learning will create space for reflection:** Learners, where possible, will be offered a safe and supportive space with peers to take time out to reflect on their practice, goals and self-development. Allowing time for action learning, group work and feedback is considered vital.

ACTIVITIES TO BUILD THE GROUP OF LEARNERS

At the start of each module the facilitator will help to “create the group” through using an exercise to build trust between the learners. The facilitator will also establish agreed rules within the learning group. Both these exercises can help to develop mutual confidence and collaboration.

Keep in mind that there will be participants who will not attend the make the full itinerary of modules. So, there will be a different group for each module and the facilitator will need to build trust in the group each time. Therefore, it may be necessary to have written rules and create virtual places for exchanging and meeting new participants.

DELIVERY OF THE MODULES

This programme is designed to be delivered face to face, on line or both (blended learning). The contents and outcomes are the same but the activities for the on-line have to be different as you will be learning by yourself.

MATERIALS MAP

In order to enable future collaboration, modification and development of the modules through updating of the activities, references and contents, this learning programme has developed a 'virtual knowledge tool' or Materials Map. This Materials Map contains contents and other information necessary to complete each module. It will also have book references, links to web pages, institutions address and a file database.

>>> <http://learn.socialbiz.eu/>

You are encouraged to add comments and new resources in this Materials Map!

The links and instructions to access this Materials Map will be facilitated through the SEE project web page.

>>> <http://socialbiz.eu/>

CASE STUDIES

The SEE Learning Programme has 12 detailed and written case studies from across Europe. There are also 4 full case studies with written materials and video clips which analyse and illustrate the experiences of social enterprises. The SEE project believes the case studies can help you a lot!

SOCIAL ENTERPRISE PLAN (Module 7)

The methodology used in this learning programme is very open to diverse participation. You can choose to work towards a social enterprise plan or not.

You may prefer to concentrate on your social enterprise plan at the end, after completing all the modules. Or you might prefer to write it in the way that most suits your skills, experience and your social enterprise.

In Module 7 we offer you the Guide for Social Enterprise Planning or a simpler Business Model Canvas. As with all models, both are guides and can be changed or adapted to each situation.

We recommend that you (individually or in group) have a social enterprise idea from the beginning of the planning process. It would be better to work with a real social enterprise, if possible.

ASSESSMENT, REFLECTION AND ADVICE

This programme will be delivered in several countries. In each case, the assessment system will be different. In any case, the important aspect is to be useful for learning about social entrepreneurship.

A general Evaluation Sheet will be proposed at the end of each module to allow you to assess the quality and effectiveness of the learning.

>>> <http://learn.socialbiz.eu/resources/single/?id=64>

In order to facilitate the assessment, the programme proposes a tool: the **Reflective Grid**. You can see the grid below. Of course, this model can be adapted to each situation.

Module title:	
What I found most useful about the module...	What I found least useful about the module...
What I shall do differently in the future...	What I have concerns about...
Things I need to think about or discuss more...	Things I need further clarification on...

Each module cannot be all things to all people and it may be necessary for the facilitator to signpost you to other appropriate and relevant advice. So, you will be advised of other resources and where they can be obtained. It is essential to be able to go to other experienced people with specialized knowledge and skills.

USE OF THE LEARNING LOG

The **Learning Log** is a tool to stimulate your reflection and to build up a resource that you can refer to at a later date. The goal is that you create your own learning conclusions after each module. It is personal and is entirely to benefit you.

>>> See <http://learn.socialbiz.eu/resources/single/?id=21>

We suggest that it is a voluntary tool.

Example of a learning log:

Date	Issue, concept, idea seen in the workshop	What I learned from it?	How I will specifically use it in my idea or enterprise?	Further personal investigations to deepening

ACCREDITATION

The SEE Project is not committed to obtaining accreditation for this learning programme. However, the SEE Project *may* look at accrediting the learning programme with a suitable accrediting agency in each country or at European level.

MODULE 0. PREPARING to change the world

MOTIVATING FOR SOCIAL ENTREPRENEURSHIP

This module is about personal reflections and motivation. Setting up a social enterprise is an important choice, and as a social entrepreneur you should consider why you are motivated to take this path.

There may be people attracted to social enterprise by the novelty of the concepts. Others may be attracted by all the recent "marketing" of social entrepreneurship. Others may have spotted an opportunity to tackle a social need and others may just be drawn to know more about it. On the other hand there may be some learners who have been working in this field for a while and may want to 're-charge their batteries'; others may want to check out their actual social impact; others may just want to learn more about what others are doing in the field of social enterprise. There is a whole host of reasons why learners want to learn and in all cases an exploration of motivation and realistic reflection should be encouraged and supported before moving on.

This learning programme will not judge your motivation. We are encouraging you to be aware of your own motivation.

Some motivations for becoming involved in social entrepreneurship...

Changing the world is not an easy task, really!

Establishing an enterprise is not easy!

So, imagine how difficult it is to change the world through establishing and running an enterprise!!

You can be motivated by the result of your work (motivation transcendent), for what you get out of it (extrinsic motivation) and what you like about the activity (intrinsic motivation). We recommend that you balance these three types of motivation.

You are about to begin an amazing journey. First of all, we recommend reviewing your motivations and skills at the beginning of your journey.

If you belong to a team, we recommend that you reflect individually first and then share your findings within the team.

Desirable competences for social entrepreneurship...

Experience suggests that there are some useful skills for social entrepreneurs:

Resilience: the ability to overcome difficulties and frustration and recover after failures. Ability in managing stress and avoiding "burn-out". Meeting the challenge of "swimming upstream" in a 'neoliberal' business environment and a consumer society -Being an optimist but being objective with the difficulties or threats.

Facing permanent change: through continuous learning and adaptation of the organisation and the services provided, but without losing sight of the mission. Working through chaos and dealing with complex issues. Managing time and an ability to meet several challenges

simultaneously. Being creative to imagine new solutions to every problem and forming initiatives to carry them out. Thinking about the past and discussing future prospects.

Ability to work with people: Avoiding any type of elitism or paternalism in the approach and treatment of excluded people. Being able to take account of your own and others' emotions and managing personal conflicts. Ability to work in teams locally but also trying to be part of a global network.

LEARNING OUTCOMES

By the end of the module, you will have worked towards the following learning outcomes:

...become aware of the complexity facing the social problem you want to address and – at the same time – have created and managed a business to tackle that problem or need. Therefore, it is important to ensure that you **are able to have a better understanding of your role in a changing world.**

...become more self-aware of your own motivation for working in this area in order to avoid errors and frustrations. Many people who work through this module may think they do not have enough experience in the social world, or in entrepreneurship, but may have good intentions to "change the world".

...identified your own competencies and be able to critically analyse your skills, both individually and as a team. Starting a social enterprise requires some special skills and abilities for managing motivations and emotions which are different to for-profit businesses. Among these skills is the capability to juggle with social goals and sustainability as well as to manage conflict and burn-out.

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

It is important to recognize the source of your support systems and at the same time to be able to address the complexities and difficulties of social change.

If you attend the face-to-face workshop, the facilitator will have designed a lot of activities. In the Materials Map you'll find resources corresponding with the proposed outcomes. If you are a self-learner, we propose some ideas:

- 1 Write a short piece on your motivation for making a Social enterprise, after that, share it with your fellow learners
- 2 Read and watch the case studies (Information Sheets) about social enterprise. Is there anything interesting and helpful to note?
- 3 Assess your competences and see where you may require additional help from other people.
- 4 Identify areas for improvement. Make a list of key learning points you will need for your future learning.

5 Watch video clips about competences and motivations of entrepreneurs.

ETHICAL CONSIDERATIONS

Ethical considerations are a “must” for a social enterprise.

The survival and the profit of a social enterprise is not important **if** the ethic is lost and the activity doesn't address to the mission or the reason the social enterprise was set up in the first place.

Sometimes it will be difficult to resist the pressure of just running any other business.

We recommend some things you may want to consider:

- Understand yourself but be aware of not ‘pigeon-holing’ people into rigid categories
- Be open but at the same time try not to be vulnerable
- If your motivations are not really social, but you simply want to use the ‘social seal’ to improve your sales, you may run into contradictions with your values and your stakeholders will soon realise your real mission. The deception may be worse...

EVALUATION OF THE MODULE

What should we improve in this module?

Please, complete the evaluation sheet which can be found in the Materials Map

>>> <http://learn.socialbiz.eu/resources/single/?id=64>

- Do you have any suggestions about the contents?
- What have you learnt well?
- What has been tricky?
- What should we do differently in the activities?
- What can be improved in materials?
- What do you think about the facilitator?
- Other considerations...

SELF ASSESSMENT: LEARNING LOG

We recommend that you complete the Learning Log:

Date	Issue, concept, idea seen in the workshop	What I learned from it?	How I will specifically use it in my idea or enterprise?	Further personal investigations to deepening

MODULE 1. BUILDING a better world

LEARNING ABOUT SOCIAL ENTERPRISES

This module will introduce you to the values and purpose of social enterprise, the distinctive elements of social enterprise and how it differs from mainstream business.

Social enterprise is a relatively new way of achieving social goals...

The persistence of many social problems has produced new responses. The concept of social enterprise or 'social business' is relatively recent and has different interpretations and legislation in different countries.

In the main, social enterprises are companies whose main goal is to solve a social problem and at the same time to allocate profits (in whole or in large part) to achieve its social goal and not to distribute profit to the owners of the company.

Social enterprises are only a small part of all the actors in social society and will never be able to solve all the problems of inequality and sustainability. It is important to create and maintain with other actors in this area such as government and other agents of social change.

The map of entities acting to affect social change is often quite complex as there are always emerging new initiatives. There may be co-ordinating bodies which can act as a main reference point but in any case we suggest you invest enough time and effort to get to know relevant social networks or organisations working in the same field as you. In doing this maintain a balance between organisations that have a similar mission to you and others who may be able to help with your learning. But remember - you cannot be everywhere!

Maintaining a connection with the local and the global...

Social problems are very complex, have deep causes and are shared by many countries. Some causes have their origin and possible solutions in an international context. Therefore, it is recommended to establish connections in that international field to share experiences and strategies.

Consolidated social change sometimes requires campaigning to change legislation and/or obtaining contracts from the public sector. To achieve either of these goals, we recommend establishing partnerships with organisations that are complementary to you. So, all together, you will be able to combine political, social, commercial and productive actions.

Find your ecosystem...

The ecosystem is an environment for starting, growing and sustaining social change in the long term. We suggest you search for space to work collaboratively. This may mean getting support from your local authority or community, other social enterprises, other experts, and so on...

As a social enterprise is a complex issue, we recommend that you lean on other people and institutions as much as possible. Be aware of the "ecosystem" you need to nurture!

LEARNING OUTCOMES

By the end of the module, you will have worked towards the following learning outcomes:

...understood why social enterprises are necessary and their effect on people, the planet, the economy and on the culture whilst framing the concept of social enterprise in the historical moment of the global economic crisis. Also, assert the validity of the concept of social enterprise in any economic moment.

...established what is - and what is not a social enterprise. This involves getting deeper into the definitions, values and ethics of social enterprise. You should be able to understand better what social enterprises are and the different nature of social enterprise, compared to traditional business and NGOs. There should also be a better understanding of the difference between social enterprise and companies with social responsibility.

... learnt that although the concept of 'social enterprise' is relatively new, there is a long tradition in European social movements and the social solidarity economy. You should recognize that the current situation with social enterprise has been built on previous experiences.

...be able to draw a map of the types of entities in the social enterprise sector at least at a local level. You should be able to get to know what other players there are in your country or even internationally. You should discover and use the "ecosystem" around your social entrepreneurship.

... understood that to generate social impact in a sustainable manner it is necessary to connect your local operation with larger scale entities at national and global levels. You should be able to think about strategies and initiatives to collaborate on in order to strengthen your activity.

ACTIVITIES TO GET EACH PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

If you attend the face-to-face workshop, the facilitator will have designed a lot of activities. In the Materials Map you'll find resources corresponding with the proposed outcomes. If you are a self-learner, we propose some ideas:

- 1 Visit some social enterprises and ask why they consider themselves to be social enterprises.
- 2 Analyse the 'ecosystem' around your social enterprise and what support is out there for your social enterprise. Map stakeholders, resources, contacts, allies, etc.
- 3 Read articles to deepen the values and ethics of social enterprises through practical and real examples
- 4 Write down the "mission" of your social enterprise and think how this will practically solve the social, environmental, economic and cultural problems.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

We recommend some things you may want to consider:

- What negative social impact can be generated from large traditional businesses?
- Debate about the core criteria in order to be considered a social enterprise. Is it right that companies with a slight social impact want to be identified as social enterprises? Is it a form of bonding companies to "the cause" or does it undermine the concept of social enterprise?
- Is it realistic to think that social enterprises can "change the world"?
- In theory there should be co-operation with other social organisations, but sometimes they compete for the same resources or even the same users. How do you get round this problem?
- To what extent should social enterprises replace the state? Should this be a goal of social enterprise?

EVALUATION OF THE MODULE

What should we improve in this module?

Please, complete the evaluation sheet which can be found in the Materials Map

>>> <http://learn.socialbiz.eu/resources/single/?id=64>

- Do you have any suggestions about the contents?
- What have you learnt well?
- What has been tricky?
- What should we do differently in the activities?
- What can be improved in materials?
- What do you think about the facilitator?
- Other considerations...

SELF ASSESSMENT: LEARNING LOG

We recommend that you complete the Learning Log:

Date	Issue, concept, idea seen in the workshop	What I learned from it?	How I will specifically use it in my idea or enterprise?	Further personal investigations to deepening

MODULE 2. CREATING social change

INTRODUCING SOCIAL CHANGE

In this module you have to identify the social need and find ways in which this need can be met. The idea you come up with has to not only address the social need but also ensure that your social enterprise is commercially sustainable and with a large enough market. Only then can the idea be put into practice.

Also in this module, you will begin to define your strategy and tools which can be placed into your overall social enterprise plan.

Designing ideas...

There are thousands of organisations including, in some cases, the welfare state that are trying to solve social problems. You have to ask yourself is your idea actually original and effective?

It is not easy to find new good ideas that affect social change – it is also hard to maintain a social enterprise to put it in practice. We recommend that you thoroughly investigate what is being done by others around the same issue and use creative tools to think about ideas around social innovation.

Some tools to help you design an idea...

A social enterprise plan is not the same as a business plan. However, in both models you have to explain your goals and how you are going to achieve them - always with justified and objective decisions. The differences are that, in the social enterprise plan you have to explain the social value you add to solve the problem and how you are going to communicate that to stakeholders. Also, in a social enterprise plan you need to be able to explain how the services and products respond to market needs, changes in society, your marketing plan and income and expenditure. The destination of the profits has to be very clear.

Your business model should be a short resume of the overall social enterprise plan. Its objective is to make a very visual presentation of your idea with the key points. We recommend you look at the Business Model Canvas in the materials map
>>> <http://learn.socialbiz.eu/resources/single/?id=20>

In analysing the reality of social need you have to be very systematic and objective and to use proven tools. It will be necessary to be selective in looking at the information available. Also consult experts, ask those that your ideas intend to benefit, and read the best and most up-to-date studies. There is a lot of information but you cannot read everything, you need to be efficient and selective!

LEARNING OUTCOMES

By the end of the module, you will have worked towards the following learning outcomes:

... have **obtained tools to assess social needs** and confirm what the social need actually is. Also, you will have learned to distinguish between 'needs' and 'wants'.

... **understood the concepts of creating social value and commercial value.** Identify the business potential related to a social necessity and understand that it is not easy to link and balance both objectives - commercial and social.

...**translated the value of your idea into services or products.** You will have thought through in detail what the social enterprise intends to do and how the products and services are related with social need. Some or all of these services or products will be sold in the market and, therefore, entrepreneurs must do adequate market research. On the other hand, it should be checked if the idea meets the social need identified. You should remember that 'charity is not enough' and you must check that the user, client or funder consider what adds value for them.

...**thought about the strategy to carry through your idea and how to achieve social change.** To do this, you will define a first approach to your Vision, Mission, underpinning Values, Objectives and related Activities.

... **kept in mind that a good idea is not enough. The implementation of this idea and the future management of the company is more important.** The quality is critical to survive even with 'social' orientated consumers.

...develop an **overview of what is the core part of the Social Enterprise Plan**

ACTIVITIES TO GET EACH PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

If you attend the face-to-face workshop, the facilitator will have designed a lot of activities. In the Materials Map you'll find resources corresponding with the proposed outcomes. If you are a self-learner, we propose some ideas:

- 1 List the societal needs you want to look at and how can they be addressed
- 2 Analyse the "ecosystem" around you, and the support you may be able to tap into. We suggest you map your stakeholders, resources, contacts, etc.
- 3 Watch SEE Information Sheets (case studies) and analyse the social needs that have led to the creation of the social enterprises; identify the need they are addressing – are the needs explicit? In addition, analyse the services and products these social enterprises offer. Are they appropriate to the social necessities and the market?
- 4 Try to remember examples of good ideas that failed because of bad implementation. Extract conclusions about the importance of implementation.
- 5 Identify and analyse your 'social consumer' needs, including the pricing for services with social value. Define the needs for each customer segment. What are the main differences with traditional consumers (Materials map: Social entrepreneurship guide Comillas University; BMC for social enterprises)

>>> <http://learn.socialbiz.eu/blog/guide-to-social-enterprise-planning>

6 Dedicate several days to investigate how the services and products of your social enterprise meet the necessities of your stakeholders and how this could affect social change. Test the idea with potential customers, using repetitive questioning techniques, for example

7 Try to define a first draft of your Vision, Mission, Values, Objectives, Activities, outputs and outcomes.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

We recommend some things you may want to consider:

- Does it makes sense to produce superfluous luxury goods for a social purpose?
- Needs at a local and global level – are they real needs? How do you know?
- Efficiency of social enterprises: Could there be more efficient alternatives?
- Are you actually prepared to implement your idea: ecosystem, team, resources, goals..?

EVALUATION OF THE MODULE

What should we improve in this module?

Please, complete the evaluation sheet which can be found in the Materials Map

>>> <http://learn.socialbiz.eu/resources/single/?id=64>

- Do you have any suggestions about the contents?
- What have you learnt well?
- What has been tricky?
- What should we do differently in the activities?
- What can be improved in materials?
- What do you think about the facilitator?
- Other considerations...

SELF ASSESSMENT: LEARNING LOG

We recommend that you complete the Learning Log:

Date	Issue, concept, idea seen in the workshop	What I learned from it?	How I will specifically use it in my idea or enterprise?	Further personal investigations to deepening

MODULE 3. CONNECTING with stakeholders

INTRODUCTION TO STAKEHOLDERS AND MAKING CONNECTIONS

A social enterprise is not an island! Even more than a traditional enterprise, a social enterprise is linked to a wide net of relationships with its stakeholders. In the SEE Project we define a stakeholder as a person, group or organisation who are (intentionally or unintentionally) affected by or who can affect the activities of your social enterprise - for example: staff, board, partners, clients, funders, trainees, customers, etc.

About stakeholders...

Are you fully aware of the importance of creating stable relationships with stakeholders? Do you know their needs and expectations? How do we reach them and create stable networks?

The activities proposed in this module will help you to reflect on stakeholders as a key element for the sustainability and success of your social enterprise.

LEARNING OUTCOMES

By the end of the module, you will have worked towards the following learning outcomes:

...carried out **a full analysis of all your social enterprise's stakeholders**, also defined their profile, needs and expectations and the importance of your relationships with them.

...once the stakeholders have been defined, you will then focus on **what needs to be done in terms of communication and promotion in order to create stable relationships with them**.

...obtained a **knowledge of the social implications of marketing/communication** and of the benefits that your social enterprise could receive from social communication, benefits to society, transparency, fair prices.

...understood **networking locally and internationally** and become aware of advantages.

ACTIVITIES TO GET EACH PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

If you attend the face-to-face workshop, the facilitator will have designed a lot of activities. In the Materials Map you'll find resources corresponding with the proposed outcomes. If you are a self-learner, we propose some ideas:

- 1 A social enterprise is connected to its environment and has to take advantage of all possible partnerships that can support its activities. List all the possible stakeholders (staff, board, partners, clients, suppliers, funders, trainees, other associations dealing with the same topic and that could create scale economies, administrations interested in the issue tackled by your social enterprise, public authorities dealing with the social problem, local and international networks, beneficiaries, media, communities ...) and indicate their needs and expectations.

- 2 Create a map of the stakeholders inserting them into grids based on influence-power of stakeholder/interest of stakeholder. You can start doing this exercise using a case study from the material map and then focusing on your own social enterprise.
- 3 What are the kind of relationships between the SE and the stakeholders? What are the advantages that the stakeholders could have from the relationships? List them.
- 4 What and how do social enterprises communicate with stakeholders? Please think about practical examples and identify specific messages and channels used with specific stakeholders in real cases.
- 5 Think about your own social enterprise and, concentrating on a specific stakeholder, design a communication strategy according to the stakeholder's needs and features.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

We recommend some things you may want to consider:

- Do you consider stakeholders as a source of value, inspiration, knowledge sharing and contribution to be tackled with a collaborative logic????
- Marketing/communication... you should always keep in mind that the final goal is to create social value. Do you think it always happens?
- A Social Enterprise should always make choices that suits the organisation's values and its ethos, respecting practices in the professional domain. How important is this?
- What are the limits of marketing/communication?

EVALUATION OF THE MODULE

What should we improve in this module?

Please, complete the evaluation sheet which can be found in the Materials Map

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- What do you think about the facilitator?
- Other considerations...

SELF ASSESSMENT: LEARNING LOG

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MODULE 4. ACCOUNTING for quality and impact

INTRODUCTION TO QUALITY AND SOCIAL IMPACT

A fundamental characteristic of a social enterprise is to create a positive impact on people (social), the planet (environment), the local economy and on society more generally. Social enterprises should be able to quantify and communicate this impact as an overall social value to all their stakeholders. Moreover, the social value generated should be taken into account in attracting social investment.

This module will introduce you to assessing quality and measuring impact so that you can adopt techniques and be able to account for and prove they are achieving your central social purpose. In particular, it will enable you to realise just how important it is to assess, explain or measure the social impact of a social enterprise; and it will show how social impact assessment can fit into the life cycle of your organisation.

This module will look at two approaches to impact assessment: Social Accounting and Audit and Social Return on Investment. It will consider the key differences and similarities in these two approaches and will try to help you be aware of other quality systems to ensure your performance.

Being motivated to account for quality and impact...

How you can judge if a social enterprise is making a difference or not?

Primarily you may want to improve or change the world through helping to solve a social problem that plagues our society. The value your social enterprise creates is not only measured by the economic return you give back but also by the social value you produce in terms of problems solved/reduced (i.e. number of disabled employees, air pollution reduced, etc.). Because of this it is crucial to measure and communicate to all stakeholders both the economic and social value generated.

Social impact measurement...

Understanding, measuring and reporting on the social and environmental impact created by an organisation, underpins a dynamic and transparent social sector. It also enables a flourishing marketplace for investment in and commissioning from voluntary and community organisations and social enterprises. Impact measurement has developed significantly over the past few years.

Measuring social impact should become a routine part of doing business for organisations delivering social goods and services. As well as focusing on measuring profit and loss, a social enterprise has to take account of its core business which is measuring or assessing social impact.

Social investors and donors should also understand if their money has helped to create a positive change in society and this will inform future investment. Also government should be able to assess whether public spending and purchasing decisions are having a positive social impact, focusing on the right things that provide the most value to society in the long term.

LEARNING OUTCOMES

By the end of the module, you will have worked towards the following learning outcomes:

...to have realised the **importance of assessing performance and the impact** of the social enterprise in terms of the effect on people, the planet, the economy and presiding culture

...understood the basic processes involved in **Social Accounting and Audit; and Social Return on Investment** and **other approaches**. This will help in choosing which approach to adopt

...have a **clearer idea of how impact might be accounted for, and reported on, within your social enterprise**

...be able to **communicate the social value** generated by your social enterprise to your stakeholders

...understand better how to complete the appropriate section in the **Social Enterprise Plan** devoted to social impact measurement.

ACTIVITIES TO GET EACH PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

If you attend the face-to-face workshop, the facilitator will have designed a lot of activities. In the Materials Map you'll find resources corresponding with the proposed outcomes. If you are a self-learner, we propose some ideas

1 Use a worksheet to write out 3 things that you would like to account for in your social enterprise. Think about how these things could be assessed or measured.

2 Consider quality systems. The Key Aspects Checklist covers six factors common to all social enterprises: how they treat their human resources (staff and volunteers); what they do with any surplus or profit from their activities; how they are governed; financial sustainability (financial accounts); environmental sustainability (green credentials); and what is their local economic impact.

>>> <http://learn.socialbiz.eu/resources/single/?id=30>

Use an exercise to explore the Key Aspects Checklist.

3 Read about the main elements of Social Accounting and Audit (SAA)

>>> <http://learn.socialbiz.eu/resources/single/?id=33>

What are the pros and cons of this approach?

>>> <http://learn.socialbiz.eu/resources/single/?id=32> (this is a worksheet for this activity)

4 Read about the main elements of Social Return on Investment (SROI)

>>> <http://learn.socialbiz.eu/resources/single/?id=34>

5 Carry out a critique of actual SAA or SROI reports

>>> <http://learn.socialbiz.eu/resources/single/?id=31>

6 Consider other recent developments in social impact.

7 Think about how you might introduce tracking social impact within your social enterprise. What information and data do you consider is essential or important to collect?

ETHICAL CONSIDERATIONS TO BE ADDRESSED

We recommend some things you may want to consider:

- The ethical and moral dimensions of financially measuring social impacts
- The difficulties in giving appropriate values to qualitative information
- The difficulties in assessing the true financial impacts over long periods
- The importance of assumptions in the final assessment of social accounting reports

EVALUATION OF THE MODULE

What should we improve in this module?

Please, complete the evaluation sheet which can be found in the Materials Map

>>> <http://learn.socialbiz.eu/resources/single/?id=64>

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- What do you think about the facilitator?
- Other considerations...

SELF ASSESSMENT: LEARNING LOG

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MODULE 5. INVOLVING people and leading

PEOPLE AND SOCIAL ENTREPRENEURSHIP

At its core, a social enterprise is a collaborative venture to make the world a better place. The key asset in such a venture – and even more when it comes to innovation – is people. A dedicated team of competent and committed people will resist bad luck and errors, and keep the right and true direction towards the future.

The aim of this module is to help social entrepreneurs understand that the internal structure of a social business is as important as its productive and marketing process. There are two aspects which are more relevant in social enterprises than in other organisations. Firstly, the clear and strong way in which core values are usually felt by the founders does not automatically guarantee that those values are experienced and shared by all other employees. Secondly, to keep their ethical standards, social enterprises have to ‘walk the talk’ and embody in their structure their key values, related, for example, to participation, environmental sustainability, etc.

Leadership and participation...

The great thing about a social enterprise is that professional business work is done for a shared social value – so, it is much more than “just” business – but how true is this in the day-to-day work of a social enterprise? Does the organisational structure respect and embody the values that are declared to be at its core? Is a social enterprise somehow different in how it works?

These are the issues at stake in this module, and they are connected with a few key topics: the structure of the social enterprise (including its hierarchy), participation and decision-making processes, and your own leadership as a social entrepreneur.

The way to tackle these challenges is to start from you as an entrepreneur. What do you think the core values of your social enterprise are? How important are they for you? How do you translate them into the practice in your leadership role? Do you plan to share them with your team or collaborators?

The activities proposed in this module will help you reflect on leadership and participation as two key elements in the social enterprise business.

Organisational design and legal forms...

Leadership and participation are not enough. When people come and work together, they need an organisation to reduce complexity and make their joint venture effective. What is the organisational design that will respect and embody the core values of your social enterprise?

Of course, there is no single correct answer – this is rather an open question that should always be kept in the foreground while the enterprise grows, changes and adapts to its environment.

Also, any organisation should respect the legal framework of its home country. It is important that you get familiar with legal and fiscal rules. Then you can creatively identify the best governance structure for your purposes.

LEARNING OUTCOMES

By the end of the module, you will have worked towards the following learning outcomes:

...organisations can be designed in many different ways, in order to try to fit their environment or fulfill their goals. Each social enterprise should find its appropriate organisational structure, and also make it function within existing legal forms. This module will help you **understand the range of governance models** – including **country-specific legal structures** – for social enterprises.

...the “double nature” of social enterprises, as economic organisations based on social values, requires responsible leadership. This module will provide tools to identify the **importance of leadership and participation** peculiar to social enterprise.

...different leadership and management types fit different organisations. In this respect social enterprises are different because they are based around important social values. This module will help you become aware of **different management styles appropriate for social enterprise**.

...organisational design, leadership, participation, and management: all this should serve the primary purpose of the social enterprise, helping it **develop, change and grow**.

...leadership runs in parallel with support and guidance for employees – and this is especially true in social enterprises. So, this module will analyse the benefits of **coaching and mentoring in running a social enterprise**.

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

If you attend the face-to-face workshop, the facilitator will have designed a lot of activities. In the Materials Map you'll find resources corresponding with the proposed outcomes. If you are a self-learner, we propose some ideas:

1 Think of the values and business structure of your social enterprise. What elements in the organisation are required to make people actually work together? What else could help making decisions more effective and participatory...or to make the organisation more responsive to its environment? Write these elements on paper and see how they fit with the organisation's core values.

2 What kind of leadership can you offer the social enterprise? Observe yourself in decision-making and in leadership. What type of leader are you? Who else shares this leadership with you? Make a list of possible improvements.

3 Use Information Sheets (case studies) to learn how other social enterprises are organised. This will provide new ideas! For example use cases studies such as >>> [Re-Union Full Case Study](http://learn.socialbiz.eu/blog/re-union/) <http://learn.socialbiz.eu/blog/re-union/> or the Information Sheets about

>>> Associazione Seed (CH) <http://learn.socialbiz.eu/blog/associazione-seed/>
 >>> Guri i Zi (Italy) <http://learn.socialbiz.eu/blog/guri-i-zi/>

4 Look up annual reports of social enterprises and see how they organise their activities. What is the amount of resources dedicated to organisational improvement (as this is different from service provision or production).

ETHICAL CONSIDERATIONS TO BE ADDRESSED

We recommend some things you may want to consider:

- Adopting a structure that suits the organisation and its ethos, respecting practices in the professional domain. How can this be done?
- The types of leadership and management in order to “walk the talk” and effectively communicate and share the core values. What type of leadership is the ‘best’?
- The tension in being democratic and egalitarian and at the same time decisive/effective. How does a social entrepreneur manage this?

EVALUATION OF THE MODULE

What should we improve in this module?

Please, complete the evaluation sheet which can be found in the Materials Map

>>> <http://learn.socialbiz.eu/resources/single/?id=64>

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- Other considerations...

SELF ASSESSMENT: LEARNING LOG

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MODULE 6. ACHIEVING financial sustainability

KEEPING YOUR ENTERPRISE FINANCIALLY SUSTAINABLE

This module will provide you with a basic understanding of balance sheets, profit and loss statements, and cash flow forecasting. It will concentrate on how a social enterprise ensures financial sustainability through social investment, raising funds, using sweat equity as well as earning an income. Being financially sustainable is important for a social enterprise to survive and finding the correct balance between income generating activities and other means of financing.

LEARNING OUTCOMES

By the end of the module, you will have worked towards the following learning outcomes:

...a basic understanding of the **financial book-keeping systems, the three key financial tools of balance sheet, profit and loss, and cashflow**

...an Increased knowledge of **funds, social investments and ways to ensure financial sustainability**

...greater recognition of **why some social enterprises fail** through lack of collateral, over-reliance on one type of customer and other scenarios

...an understanding on how social enterprises are **financially different**

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

If you attend the face-to-face workshop, the facilitator will have designed a lot of activities. In the Materials Map you'll find resources corresponding with the proposed outcomes. If you are a self-learner, we propose some ideas:

- 1 Read about the meaning of some key words (profit & loss, cash flow, costs, funding, pricing, income). Reflect on what all this means to you.
- 2 Study a social enterprise from the Information Sheets of Full Case Studies,
>>> <http://learn.socialbiz.eu/casestudies/>
Look at how accounts are presented in the dummy accounts.
>>> <http://learn.socialbiz.eu/resources/single/?id=42>
- 3 Find out about the 3 main financial statements (balance sheets, profit & loss, cash flow). Discuss and pass judgement on the financial health of the organisation with the dummy accounts.
- 4 Find out how to generate a cashflow forecast. Try to follow the exercise on cash flow in the Materials Map. For example: write a critique of the assumptions behind the cashflow

5 Read about cost and full cost recovery. Do the cashflow full cost recovery exercise (Costing it Up Worksheet, Costing it Up Model).

>>> <http://learn.socialbiz.eu/resources/single/?id=43>

6 Consider sources of income and the financial mix

>>> <http://learn.socialbiz.eu/resources/single/?id=41>

For example: grants, loans, contracts, crowd funding, 'sweat' equity, social investment. Try to give an overview of all local initiatives and possibilities

7 Write about the difference between a traditional and a social enterprise on the subject of taxes, benefits return, grants ...

8 Draw up a scheme of your cost-structure

9 Think about your own social enterprise and prioritise the different sources of funding. This is the beginning of developing a financial funding strategy. Try and think about identifying ways of funding your social enterprise.

10 From your own experience, write down all the reasons why social enterprises fail. Then on the other side of the flipchart write down how these reasons can be overcome

ETHICAL CONSIDERATIONS TO BE ADDRESSED

We recommend some things you may want to consider:

- How to balance both financial sustainability and at the same time maximise social purpose. Is this possible?
- A social enterprise should not be primarily making more money for people who already have money at the expense of poorer people... Discuss!
- Is social investment where investors receive a financial return from a social enterprise morally defensible?
- Making money through trading goods and services is a means to an end, not an end in itself. Discuss...

EVALUATION OF THE MODULE

What should we improve in this module?

Please, complete the evaluation sheet which can be found in the Materials Map

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SELF ASSESSMENT: LEARNING LOG

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MODULE 7. PLANNING social enterprise

PLANNING AND SOCIAL ENTREPRENEURSHIP

Writing a business plan is a common task at the outset of any entrepreneurial activity. A business plan has a two-fold value, so to say, an *inward* goal and an *outward* goal.

On the one hand, it helps the entrepreneurial team to describe their plan consistently, keeping together their goals, their aspirations, actual constraints and what they know about the market. Writing a business plan is a kind of ‘reality-check’, and at the same time an exercise of ordered creativity. This is the inward goal.

On the other hand, the outward goal of a business plan is making the business idea understandable to others, especially to stakeholders, including potential funders. A well written business plan is a powerful communication and engagement tool.

What is true in business planning also applies to social enterprise planning – only, it is more complex. It is more complex because the business plan, or social enterprise plan, is where the business structure meets the social goals of the enterprise. This encounter can become a clash, but a creative entrepreneur will be able to harmonise these two strands.

Harvesting previous modules...

This module is intended as a stand-alone 2-day learning module. This structure will help learners to focus on what they are doing and to more easily identify connections to make a consistent social enterprise plan.

The proposed methodology in this module can be easily adapted to fit your needs.

LEARNING OUTCOMES

By the end of the module, you will have worked towards the following learning outcomes:

... to have understood the essential **requirements of social enterprise planning**, that is, what are the goals, structure and style of a business or social enterprise plan. This is the basis for writing an effective social enterprise plan.

...to have learnt about **how to compile** a social enterprise plan with all the necessary elements. That is, moving to put the plan into practice and develop an original social enterprise plan based on your ideas

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

This module is different from previous ones. It is, in some ways, where all the previous efforts converge as a final step towards transforming the knowledge acquired in the programme into a real social enterprise. Previous modules will help directly in compiling a social enterprise plan. For this reason, the proposed activity structure differs from the other modules.

The learning outcomes will be approached through two different perspectives, each supported by a specific conceptual tool: the *Guide to Social Enterprise Planning* and *Using the Business Model Canvas for Social Enterprise Design*.

The two approaches blend together in supporting the process of social enterprise planning and offer multiple access points to this complex and delicate task.

A. Guide to Social Enterprise Planning

The *Guide to Social Enterprise Planning* developed by JUST the Business is available in the Materials Map. The guide will provide a streamlined step-by-step process that will lead you to the development of the social enterprise plan.

If you plan to follow this module, we suggest that you use the guide as the main reference. In this case, the Business Canvas Model will be a complementary ‘overview tool’ that you can use to identify and reflect on the interconnections in your plan. You can use the Business Canvas Model to work from any perspective you prefer so that no item on the Business Canvas Model remains underdeveloped.

B. Using the Business Model Canvas for Social Enterprise Design

The Business Model Canvas (Ingrid Burkett, Knode) is available in the materials map. It is simple, and can provide a consistent view of how the previous modules can fit together. In other words, the Business Model Canvas will help you see the connections across the different elements in the plan.

We recommend you use the Business Model Canvas as a ‘map’ to keep track of progress. This map will help you keep track of the different aspects and the knowledge you have gained. The Business Model Canvas can be considered alongside the Guide to Social Enterprise Planning – both are useful support tools for the final write-up of the social enterprise plan.

About preferences...

Depending on your learning style and experience, you might find either model more straightforward. Any blend or combination of these models can work, as long as no important aspects are left out.

An additional tool...

A useful suggestion about how to proceed with business planning can come from the Lean Startup model (see www.leanstartup.com), which presents the start-up process as a serious attempt to identify a sustainable path for innovation. Looking in more detail at this tool is worthy of consideration.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

Key consideration in this module comes from the awareness that a social enterprise plan is intended for an organisation that has the ethos of social and community benefit as its *core* business. It is thus different from a traditional “Business Plan”.

In the writing of the social enterprise plan try to think about what you are compiling. The following questions may help in this process:

- Can we emphasise or exaggerate our resulting social and community benefits to convince investors we are worthy of support?
- Is it fair to hide or minimise problems with the business model we have adopted?
- To what extent can ideas be 'borrowed' from other existing businesses?
- Is the social 'spirit' within our ideas real, or is it a 'camouflage' and are we truly just another regular business?

EVALUATION OF THE MODULE

What should we improve in this module?

Please, complete the evaluation sheet which can be found in the Materials Map

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SELF ASSESSMENT: LEARNING LOG

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FINAL REMARKS

In this Learner's Handbook we have detailed each of the eight modules. There is a focus on the important aspects of social enterprise and not on all aspects of running a successful business as that information and learning can be obtained from the more traditional business training programmes.

If you use any or just some of the information used in this Handbook we would be delighted to hear any feedback you may have. The SEE Project is keen to improve and adapt the material to ensure that it is useful and effective in supporting Social Enterprise across Europe.

The SEE project website is www.socialbiz.eu.